

# 应对聚烯烃行业变化，寻求发展机遇

王业勍

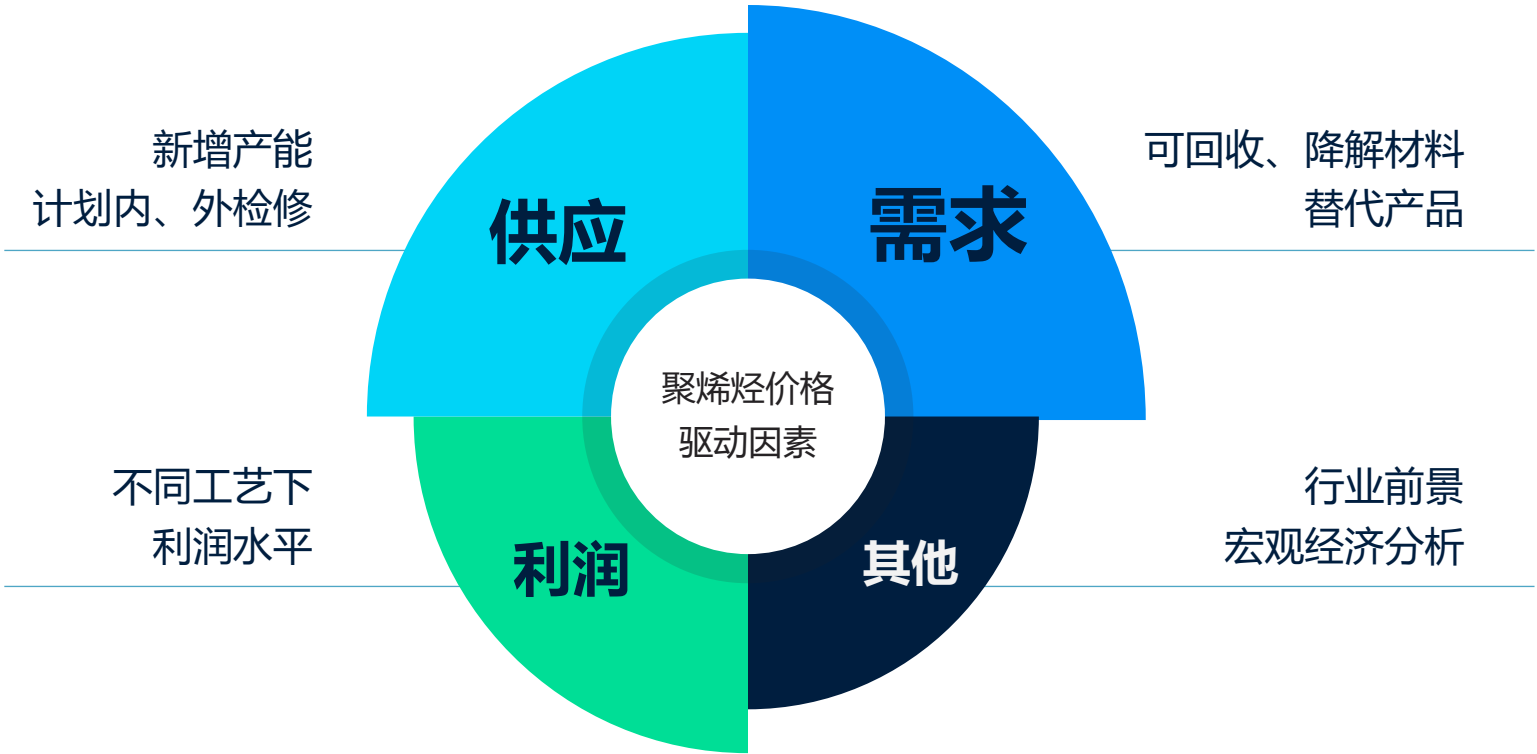
2021年4月15日

深圳

# 新装置集中投产，市场参与者面临全新挑战



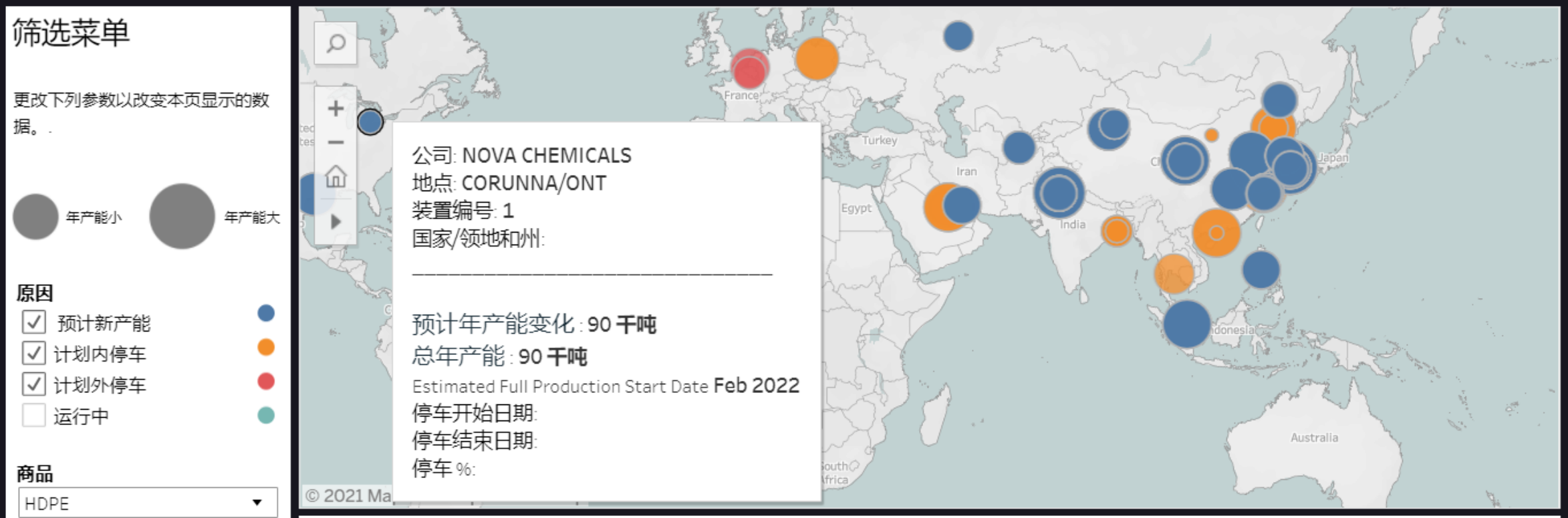
上游生产商	贸易商	下游工厂
• 量价配合	• 风险控制	• 稳定生产





价格驱动因素一：供应

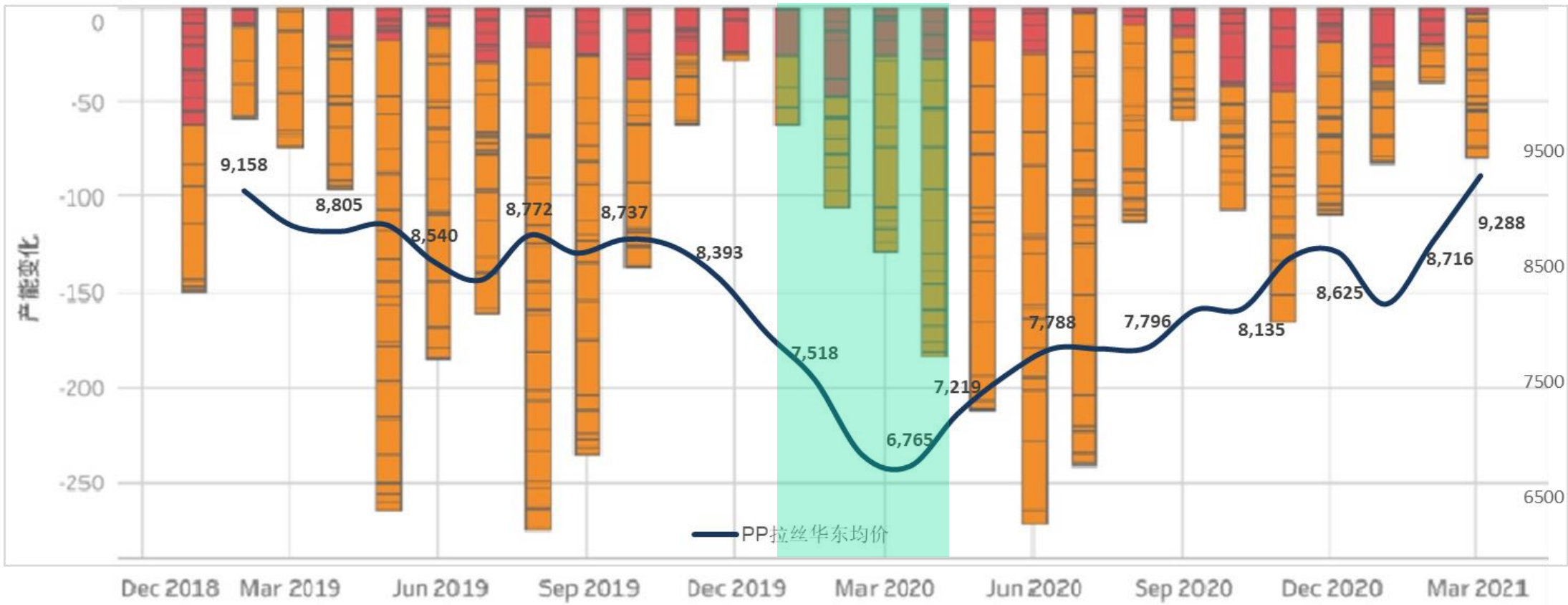
# 了解新建产能动态，分析长期供应格局



# 常规跟踪计划性检修，预判价格趋势

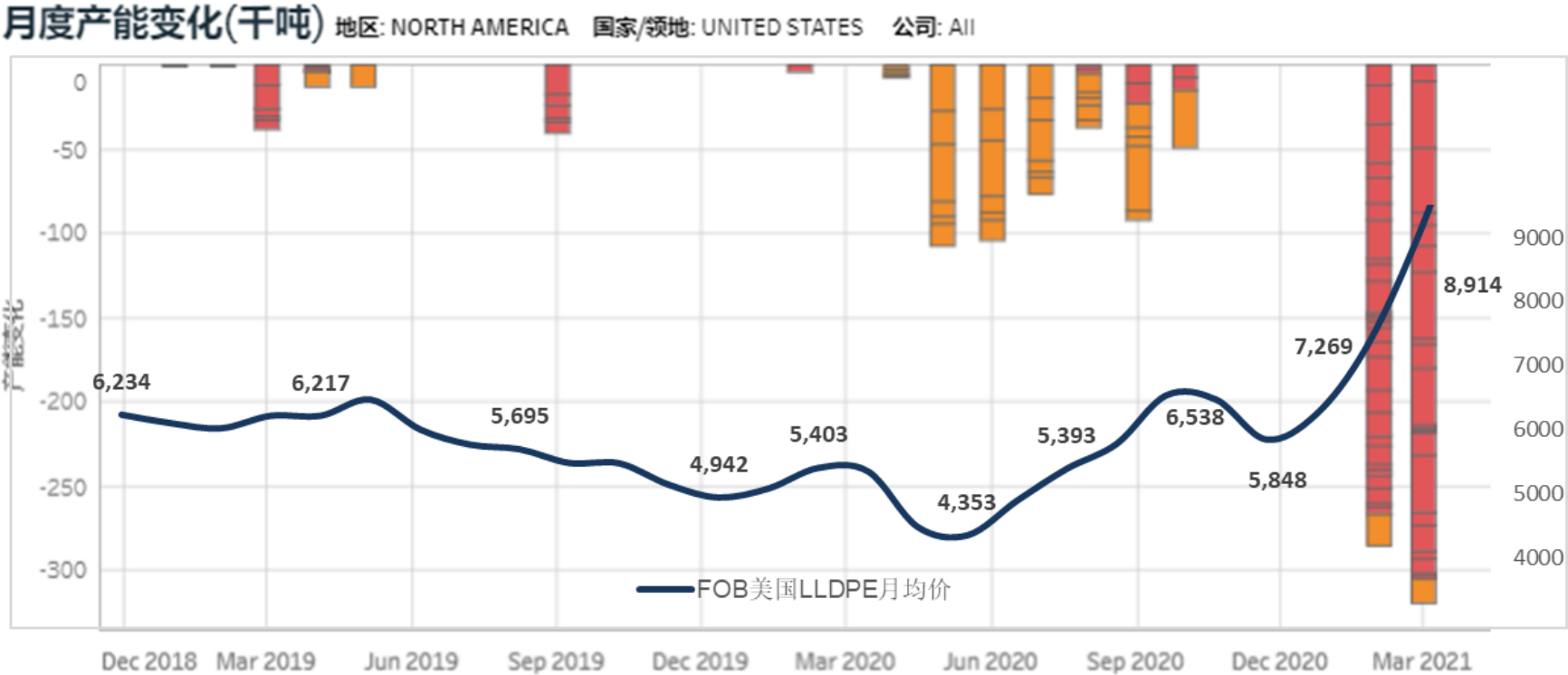


月度产能变化(千吨) 地区: NORTHEAST ASIA 国家/领地: CHINA 公司: All



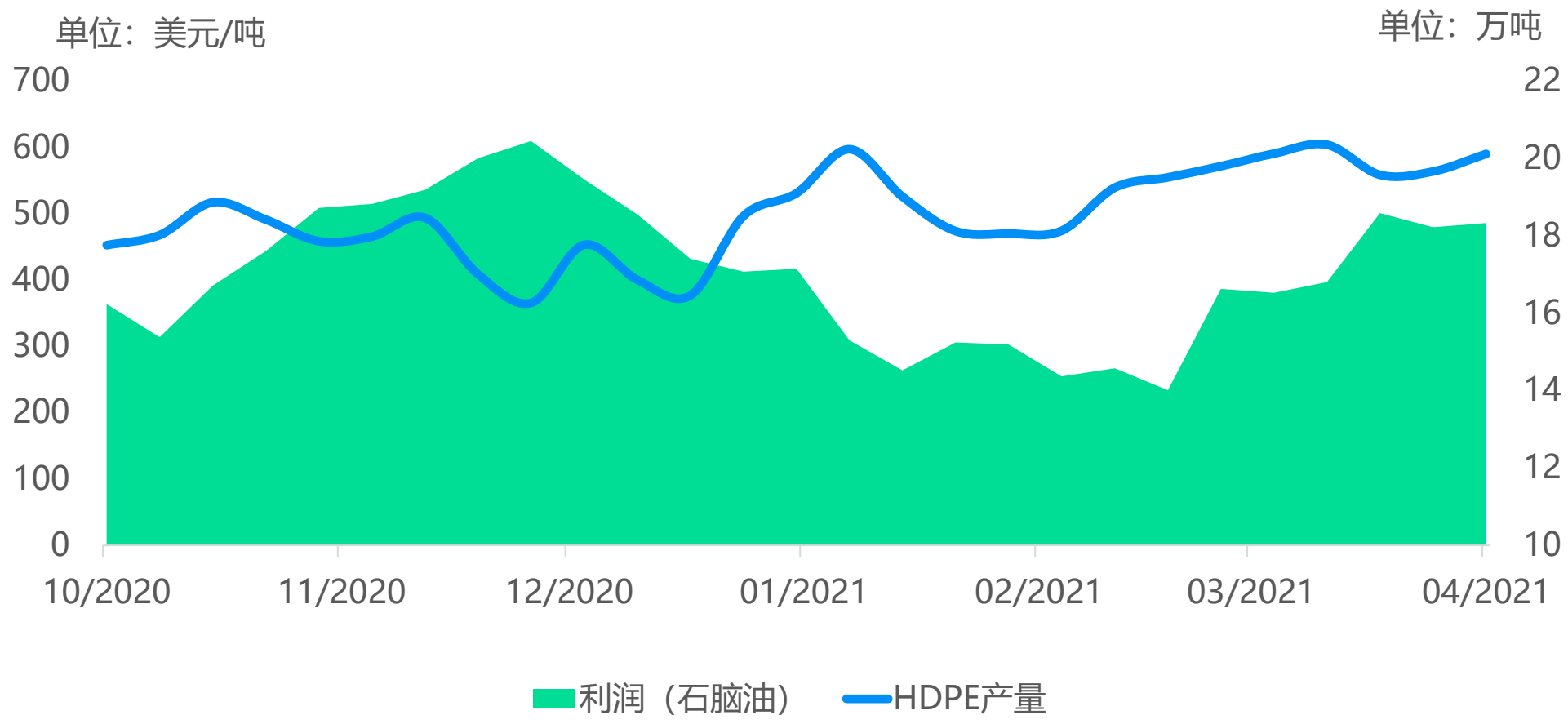


# 及时获知突发性事件，捕捉价格变动信号



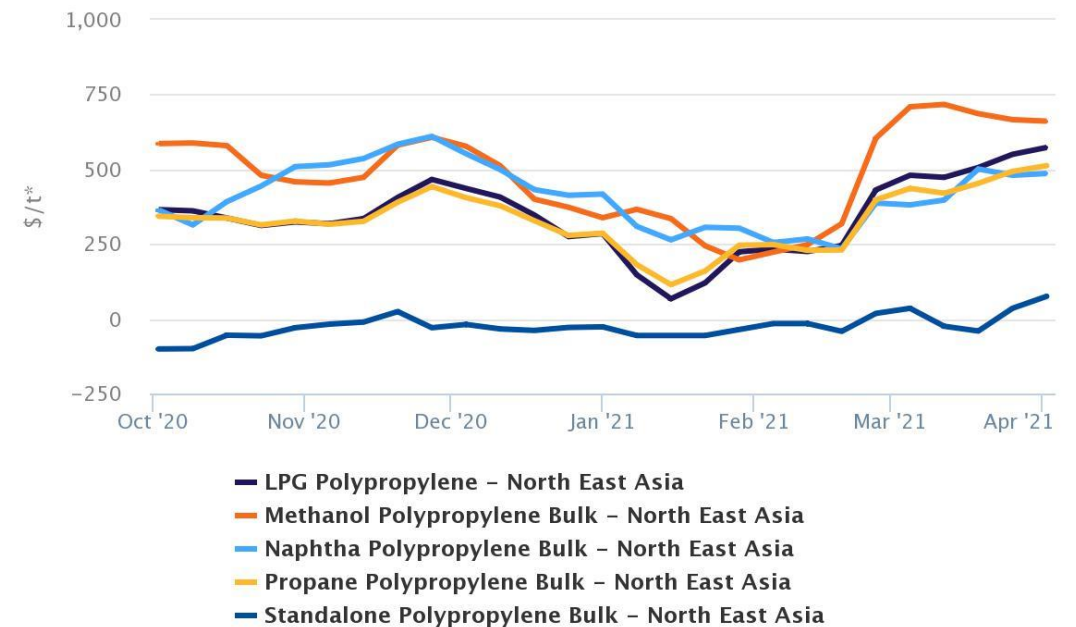
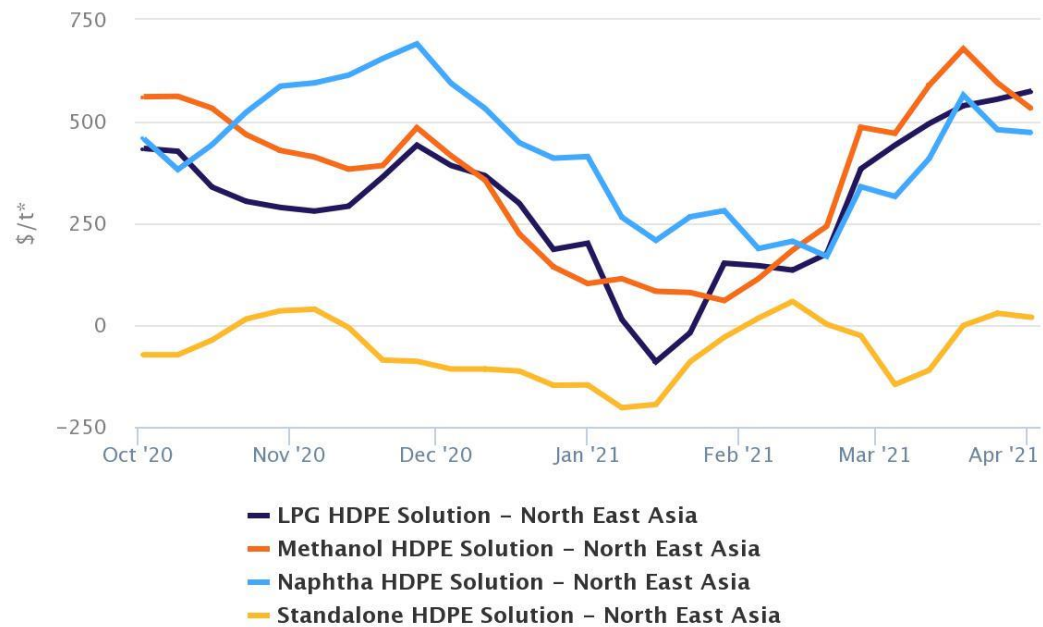
# 价格驱动因素二：利润

# 生产利润对产量呈正向影响

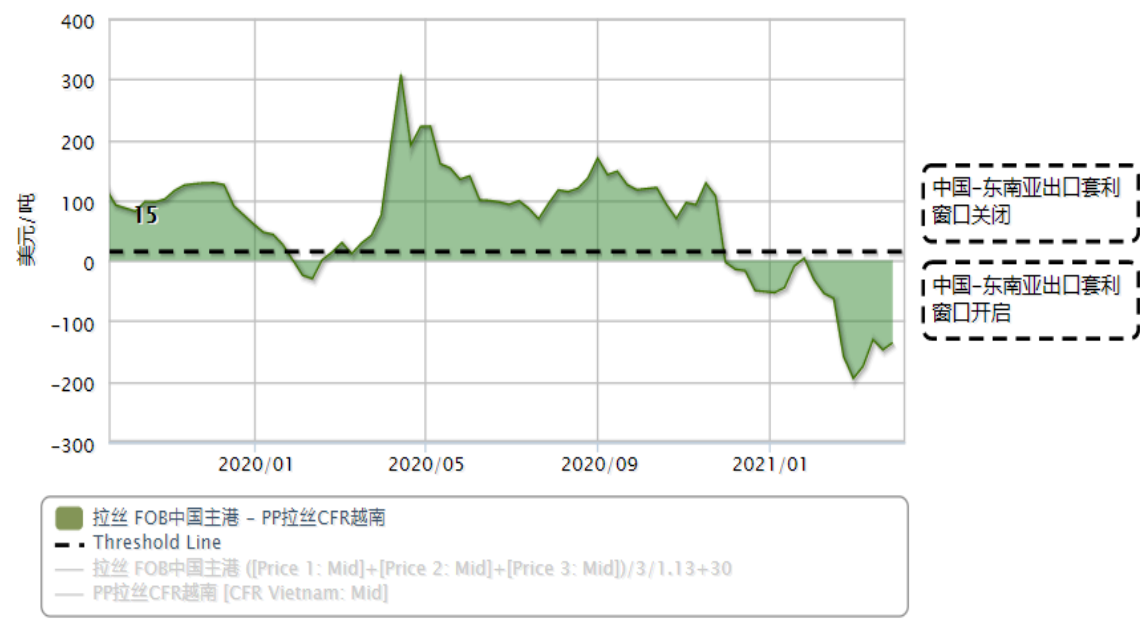
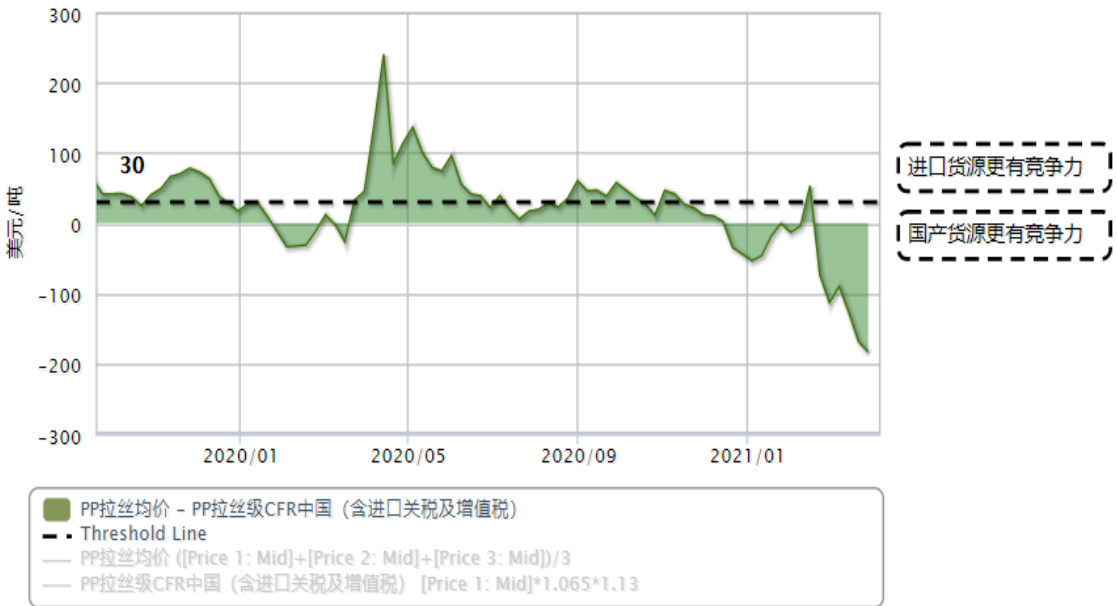




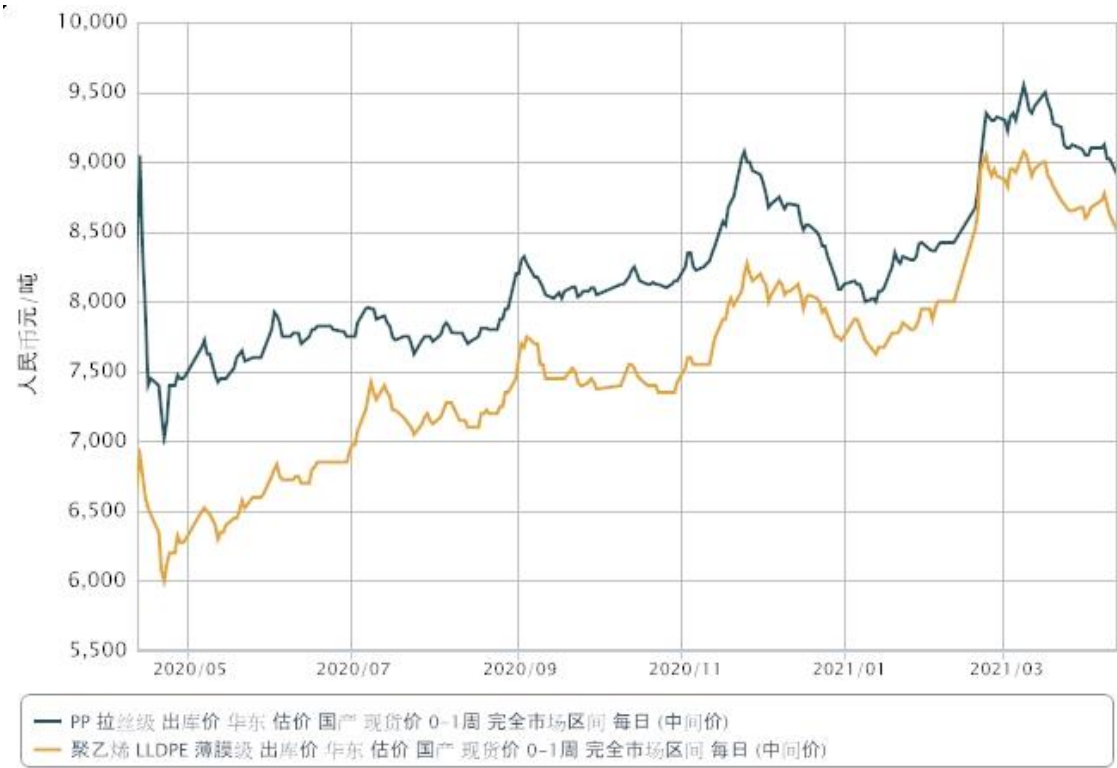
# 跟踪利润，提前预判产量增减



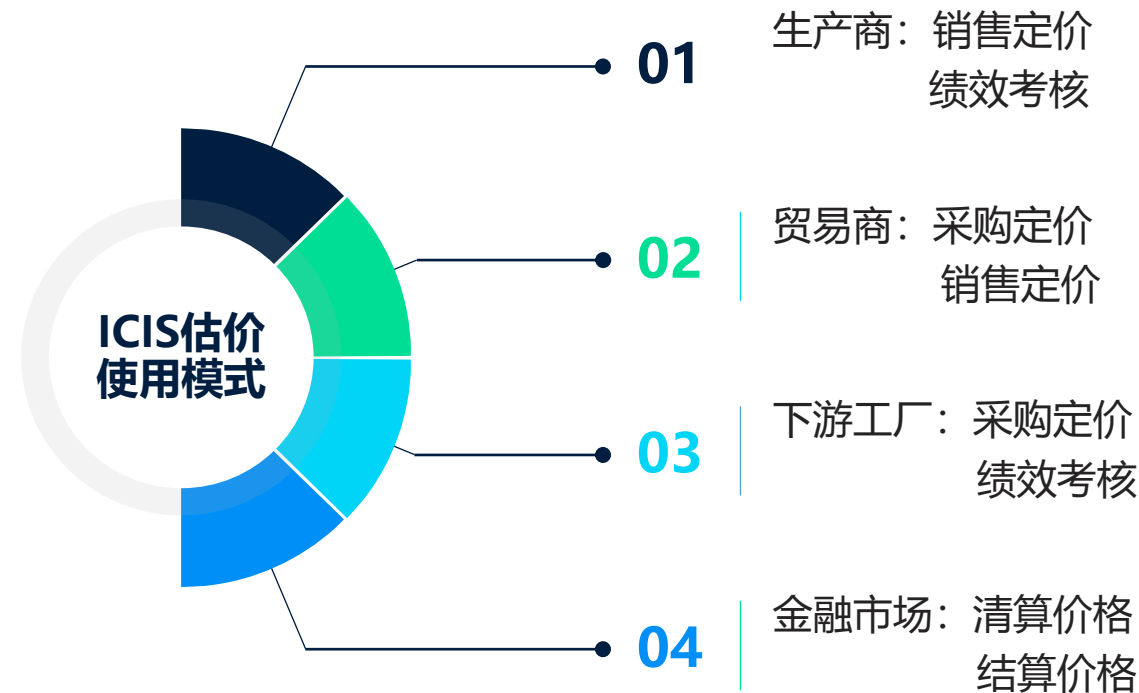
# 关注内外盘利润，把握进出口机遇



# 运用合适的价格标杆，降低交易风险



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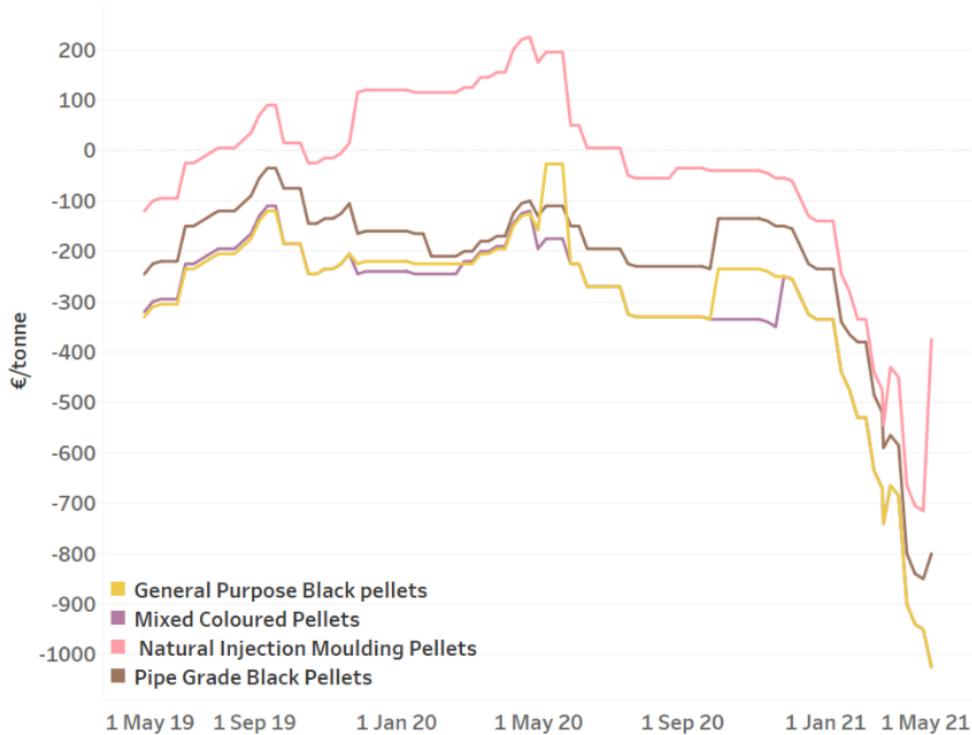


# 价格驱动因素三：需求

# 替代品发展-RPP, RPE, RPET



R-HDPE price mid-point minus virgin HDPE Film spot price mid-point



PRICING & INSIGHT | NEWS | SUPPLY TRACKER - MECHANICAL | ARCHIVE


## Recycling Supply Tracker - Mechanical

Company Name	Displaying 10 of 591 sites	Dataset	Sort	Alphabetical
21 Century Polymers	Asia Pacific, India	Operating		
Output:	R-PET, R-HDPE, R-LDPE			
Output volume (tpy):	19,800			
Installed capacity (tpy):	34,800			
Last updated 30 October 2020				
3R Hong Kong International Eco-Pioneer Limited	Asia Pacific, Hong Kong Special Administrative Region	Operating		
Output:	R-PE			
Output volume (tpy):	3,420			
Installed capacity	Telephone: 85225682836			
Last updated 09 March 2021				



# 价格驱动因素：宏观

# 掌握市场热点，把握各行业发展趋势



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Predictability in business planning



# 贸易全球化背景下更需关注海外市场动向

2021 Global Market Outlook / **Chemicals – APAC & Middle East**



2021 Global Market Outlook / **Chemicals – APAC & Middle East**

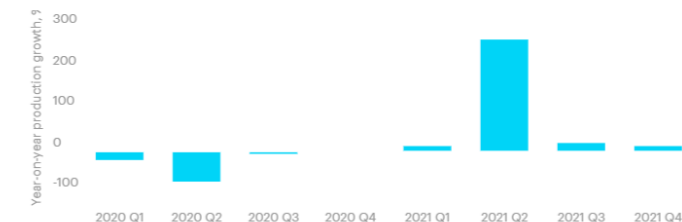


## China to drive the automotive sector in 2021

Asia's automotive industry is set to grow in 2021, with China in the lead.

China is the world's largest automotive market and its strong recovery from the coronavirus pandemic and robust economic performance is expected to be sustained into 2021. This will help to drive up demand for various petrochemicals in Asia.

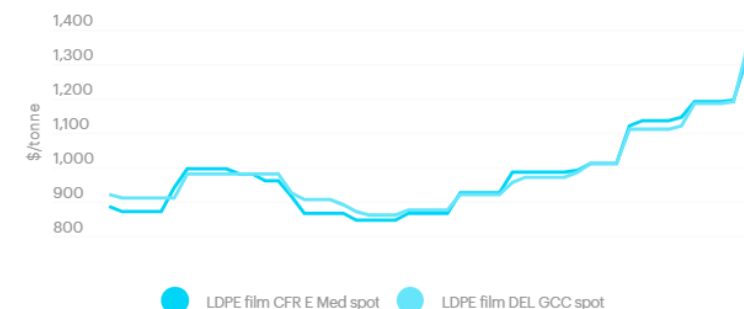
India motor vehicle sector growth



Source: Oxford Economics

Downstream Asian tyre factories are expected to run at higher rates to meet demand from car makers. This will be needed as China's auto sales and production are expected to rise in 2021 on improved sentiment and a change in consumer habits.

Middle East polyethylene price history



Source: ICIS

According to industry players, the spread of the coronavirus pandemic has not only led to greater demand for food packaging in 2020, but has also thrown open newer demand segments that may remain strong in 2021.



**Polystyrene (PS) is also set to contribute significantly to growth in packaging in 2021.**

Thank you